

Web Requisition Process

Create a Web Requisition

Log onto FAST

Click on **Requisitions** tab and then **New Requisitions**

ORIGINATOR: Leave blank, this auto fills with your id

REFERENCE: Leave blank, this auto fills with the last person to handle the Web Req.

TELEPHONE: Enter in area code, phone number

EXT: Enter your extension

SHIP TO: Click the drop down area to select the ship to address

BUILDING/ROOM: Enter room # where goods are to be delivered. ex. WH222

ATTACHMENTS: Click for check mark if there are attachments

QUOTE: Click for check mark if a quote is attached

SELECTED VENDOR: Click the magnifying glass to search for a vendor, (search by entering % then the first letter in upper case) if vendor is not found then manually enter the name.

COMMENTS: This field is optional. All comments written here will appear on the PO

DATE REQUIRED: Enter date the PO or item(s) is required

CHART: Leave as is

Click **Create Requisition** and WR # will be auto generated

The screenshot displays the 'Requisition Edit Page' within the FAST Single Sign On Suite. The browser window shows the URL: <https://fastprod.tru.ca/FASTPORTAL/FASTWEBREQ/Requisition.aspx?WR=0&PA=N&VE1=J2b1VjdD2cbwFkTiAAg==>. The page header includes the Thompson Rivers University logo and navigation links: Home, Applications, Requisitions, Purchasing, Departments, Reporting, Maintenance, Administration, Help. The main content area is titled 'Web Requisitioning > Requisition Edit Page > Create new and edit existing requisitions.' and shows the following form fields:

Originator	Reference	Telephone	Ext.	Ship To	Building/Room	Attachments	Quote	Selected Vendor
				TRU - Warehouse		<input type="checkbox"/>	<input type="checkbox"/>	

Additional fields include:

- Comments:
- Date Required:
- Chart: TRU

At the bottom right of the form is a 'Create Requisition' button. The footer of the page includes the 'Millennium' logo and the 'FAST' logo with the text 'fast administration support tool'. The browser status bar at the bottom indicates 'Local intranet | Protected Mode: Off' and a zoom level of 125%.

Adding Commodity Items

COMMODITY: If you know the commodity number then you can add it here, otherwise leave it blank and your completed requisition will be sent to the general Purchasing queue.



DESCRIPTION: Type a detailed description of the item or services being ordered

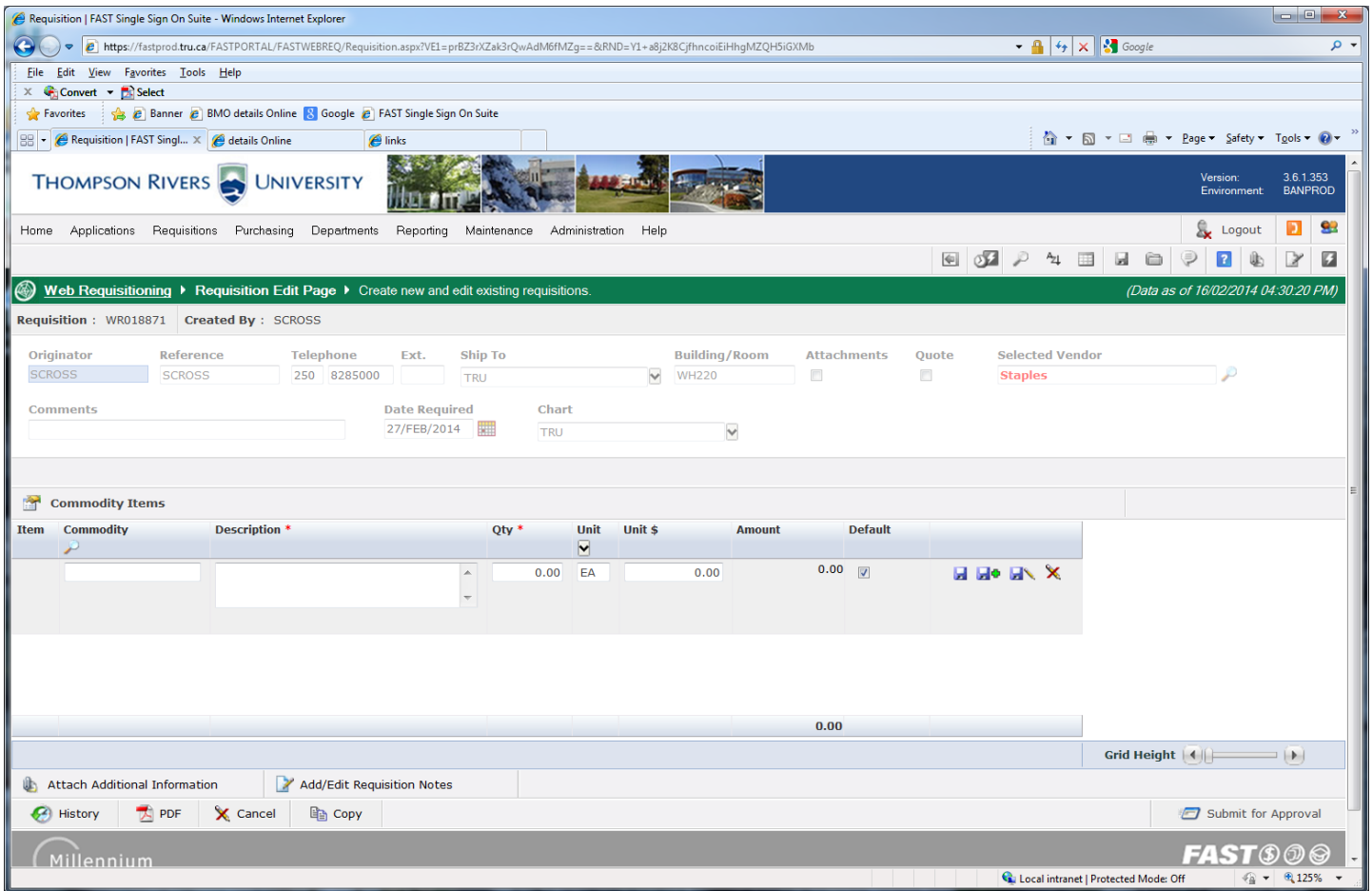
QTY: Enter quantity

UNIT: Make sure EA is selected

UNIT \$: Enter the cost per unit and the Amount will auto populate

DEFAULT: Click to check the default box if all line items will have the same accounting code

Click the Save icon  if you have only one item or  if you are entering multiple items



The screenshot displays the 'Web Requisitioning' interface in a browser window. The page title is 'Requisition | FAST Single Sign On Suite - Windows Internet Explorer'. The URL is <https://fastprod.tru.ca/FASTPORTAL/FASTWEBREQ/Requisition.aspx?VEI=prBZ3yXZak3yQwAdM6fMZg==&RND=Y1+a8j2K8Cj/fmcoiEiHhgMZQh5iGXmb>. The page is for 'Thompson Rivers University' and shows the 'Requisition Edit Page' for requisition 'WR018871' created by 'SCROSS'. The requisition details include: Originator (SCROSS), Reference (SCROSS), Telephone (250 8285000), Ext. (), Ship To (TRU), Building/Room (WH220), Attachments (), Quote (), and Selected Vendor (Staples). The Date Required is 27/FEB/2014 and the Chart is TRU. Below the requisition details is a table for 'Commodity Items' with the following columns: Item, Commodity, Description, Qty, Unit, Unit \$, Amount, and Default. The table contains one row with the following values: Item (), Commodity (), Description (), Qty (0.00), Unit (EA), Unit \$ (0.00), Amount (0.00), and Default (checked). The table also shows a total amount of 0.00. At the bottom of the page, there are buttons for 'Attach Additional Information', 'Add/Edit Requisition Notes', 'History', 'PDF', 'Cancel', 'Copy', and 'Submit for Approval'. The page footer includes the 'Millennium' logo and the text 'Local intranet | Protected Mode: Off'.

Adding Accounting Items


Click Add Accounting Item 1

This screenshot shows the 'Requisition Edit Page' in a web browser. The page header includes the Thompson Rivers University logo and navigation menus. The main content area displays requisition details for WR018871, created by SCROSS. It includes fields for Originator, Reference, Telephone, Ext., Ship To, Building/Room, Attachments, Quote, and Selected Vendor (Staples). Below this is a 'Commodity Items' table with one item: PSA'S :: XADV 2200 Climbing Gym Instructor Level I, with a quantity of 1.00 EA and a unit price of 4,000.00, totaling 4,000.00. At the bottom, the 'Accounting Items' section is visible, and the 'Add Accounting Item' button is highlighted with a red box containing the number 1.

This screenshot shows the same requisition page, but with the 'Accounting Detail for Commodity Item' table expanded. The table has columns for Line, Index, Fund, Orgn, Acct, Prog, Actv, Locn, and Amount. A new row has been added with the following values: Line 1, Index 800, Fund, Orgn, Acct, Prog, Actv, Locn, and Amount 4,000.00. The 'Add Accounting Item' button is still visible at the bottom right of the table.

Line	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Amount
1	800							4,000.00

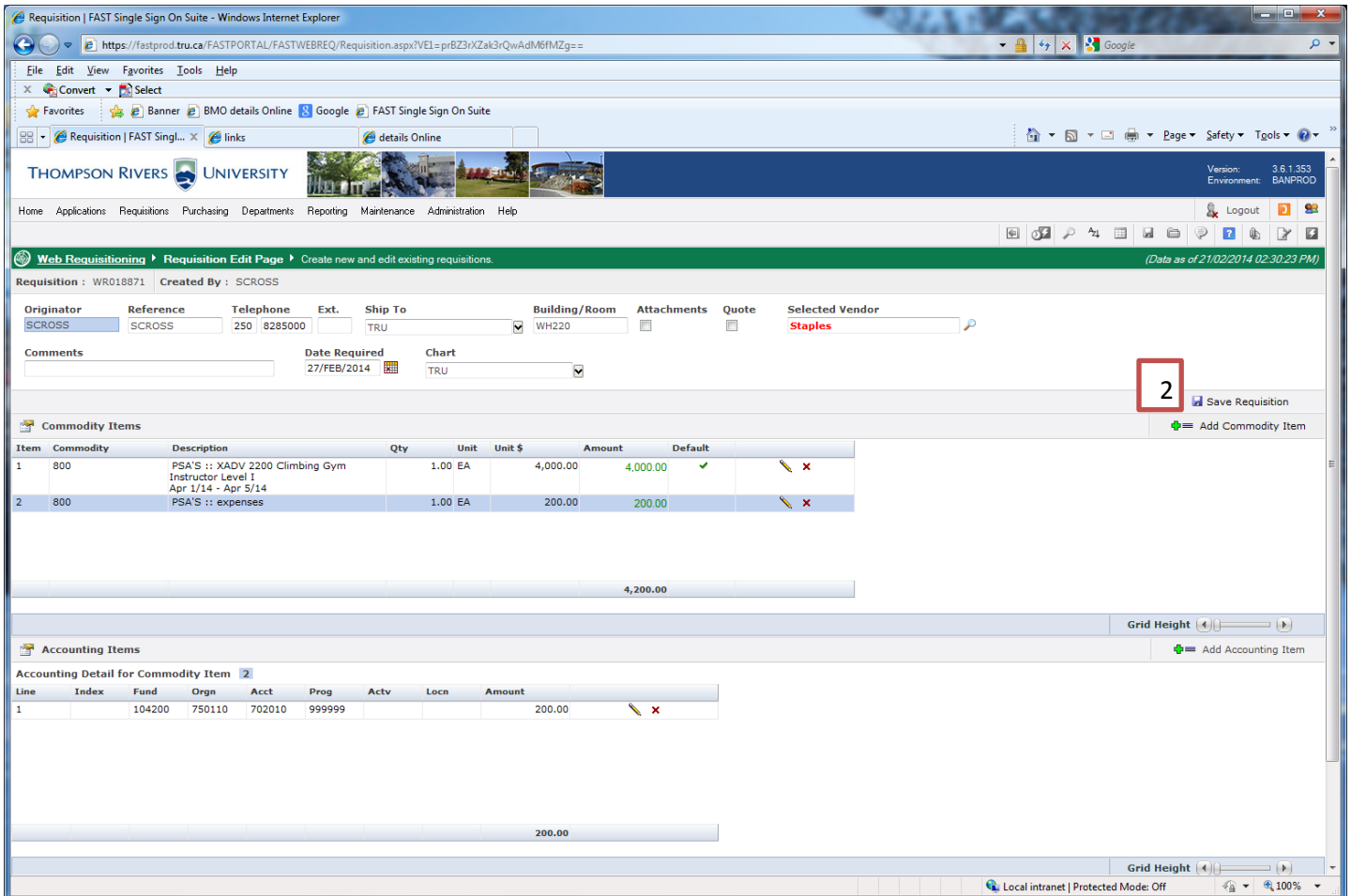
Adding Accounting Items cont'd

Enter the **FUND, ORGN, ACCT, PROG** and **Activity** (Optional) and click save 

If multiple commodity items have been entered and each commodity item has different coding,

- Click on the green or red total in the amount column of the first line item to be changed, this will open up the corresponding accounting line item.
- Click on the pencil of the accounting item to edit.
- Change the coding and press save.

When all commodity items and accounting items have been entered click save requisition. 2







Web Requisitioning | Requisition Edit Page | Create new and edit existing requisitions. (Data as of 21/02/2014 02:30:23 PM)

Requisition: WR018871 | Created By: SCROSS

Originator: SCROSS | Reference: SCROSS | Telephone: 250 | 8285000 | Ext.: | Ship To: TRU | Building/Room: WH220 | Attachments: | Quote: | Selected Vendor: Staples



Comments: | Date Required: 27/FEB/2014 | Chart: TRU

Commodity Items | Add Commodity Item

Item	Commodity	Description	Qty	Unit	Unit \$	Amount	Default	
1	800	PSA'S :: XADV 2200 Climbing Gym Instructor Level 1 Apr 1/14 - Apr 5/14		1.00 EA	4,000.00	4,000.00	✓	 
2	800	PSA'S :: expenses		1.00 EA	200.00	200.00		 
						4,200.00		

Accounting Items | Add Accounting Item


Accounting Detail for Commodity Item 2

Line	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Amount	
1		104200	750110	702010	999999			200.00	 
								200.00	

Local intranet | Protected Mode: Off | 100%

Adding Attachments

Click on **Attach Additional Information** to attach quotes, invoices, PSA's or any pertinent information 3


Click  to open the **Add Document** field

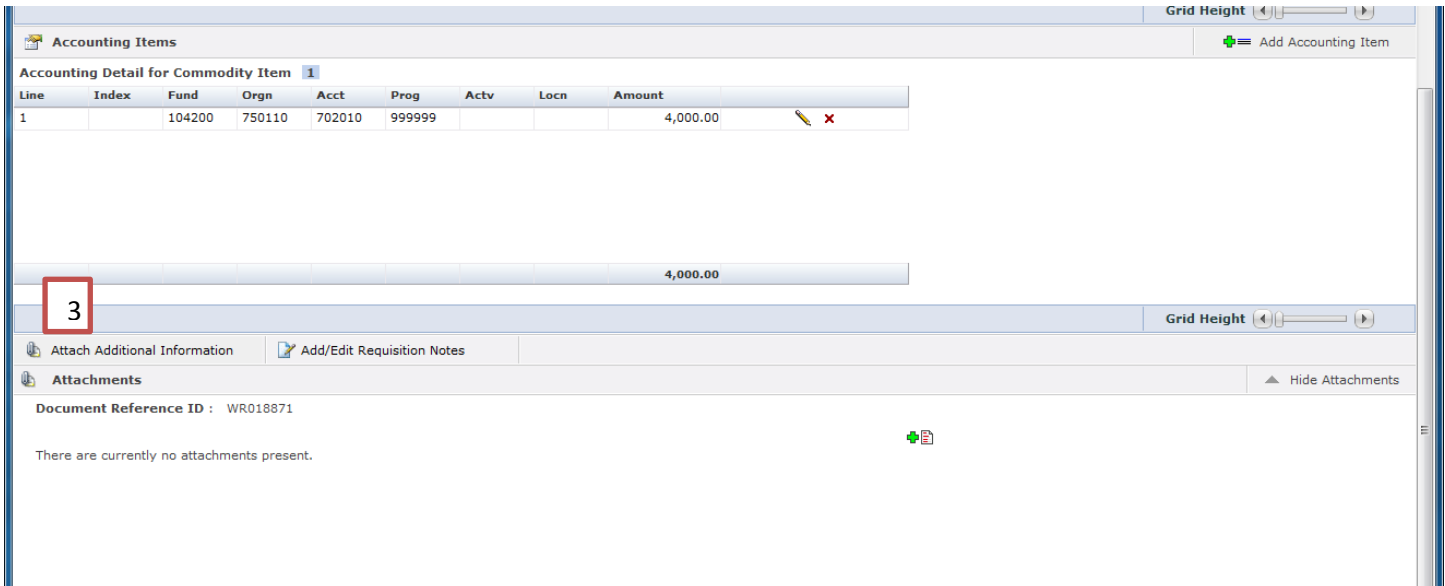
Document Comments: Enter the name of the document or brief explanation

Click **Browse** to locate the document to be attached

Click **Upload File**

Do this for each document that you wish to attach



Click **Save Requisition**  at the top right, when complete





Accounting Items Grid Height

+ Add Accounting Item

Accounting Detail for Commodity Item **1**


Line	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Amount	
1		104200	750110	702010	999999			4,000.00	 
								4,000.00	

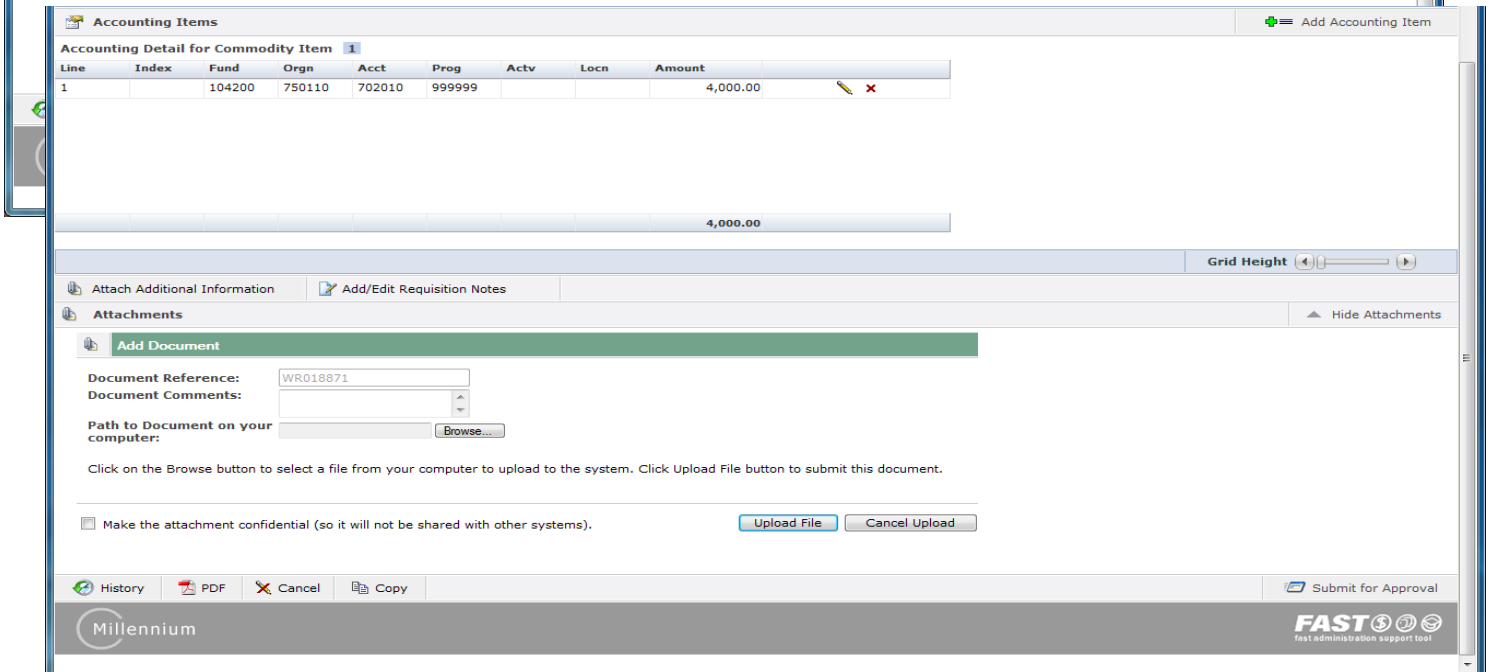
3 Grid Height

 Attach Additional Information  Add/Edit Requisition Notes

Attachments ▲ Hide Attachments

Document Reference ID : WR018871



There are currently no attachments present. 





Accounting Items Grid Height

+ Add Accounting Item

Accounting Detail for Commodity Item **1**

Line	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Amount	
1		104200	750110	702010	999999			4,000.00	 
								4,000.00	

Grid Height

 Attach Additional Information  Add/Edit Requisition Notes

Attachments ▲ Hide Attachments

Add Document






Document Reference:

Document Comments:

Path to Document on your computer:

Click on the Browse button to select a file from your computer to upload to the system. Click Upload File button to submit this document.

Make the attachment confidential (so it will not be shared with other systems).

 History  PDF  Cancel  Copy  Submit for Approval

Millennium **FAST**
fast administration support tool

Adding Requisition Notes

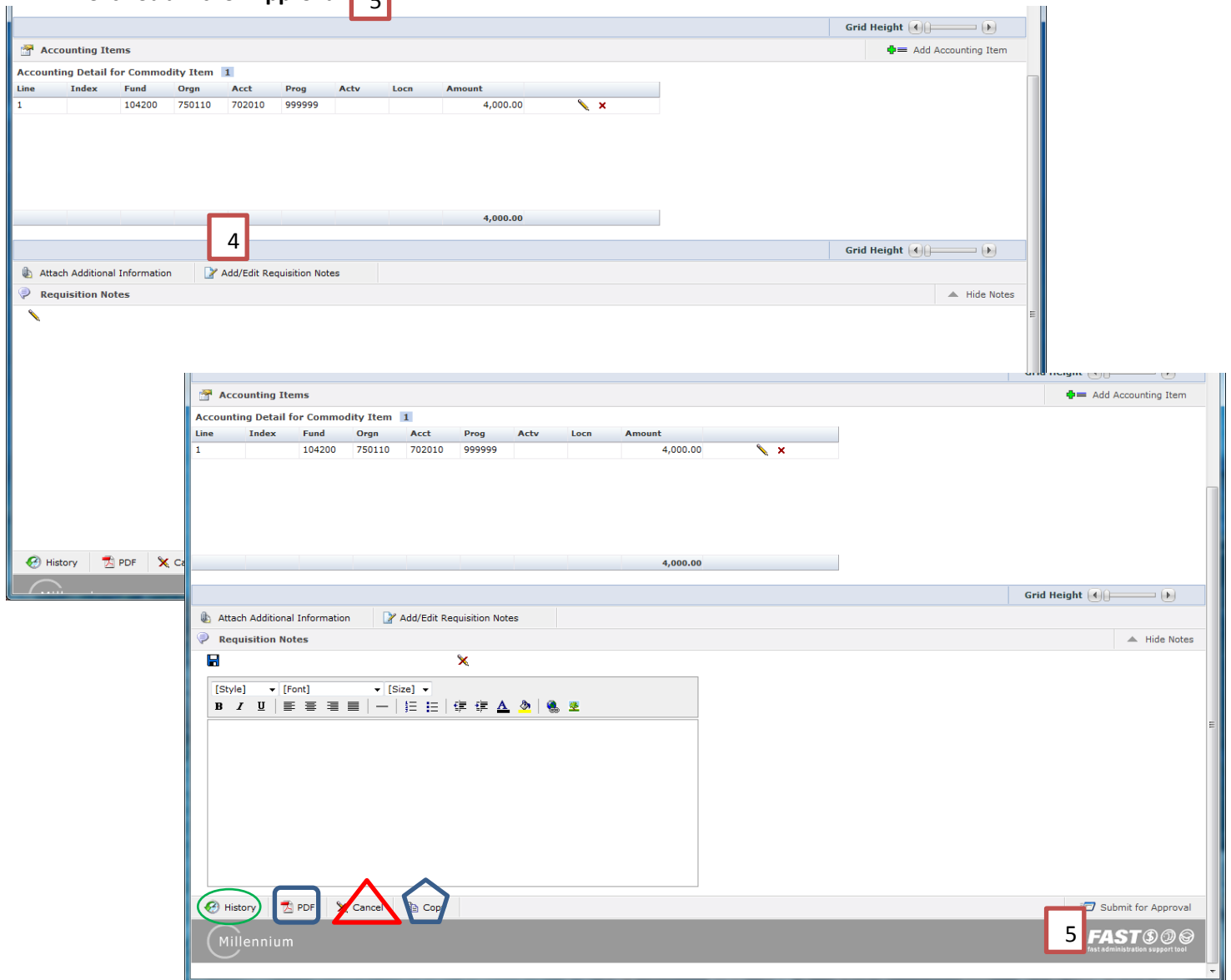
Click on **Add/Edit Requisition Notes** 4

Click on the pencil  to open the field

Click in the field to begin typing. Anything entered here will NOT appear on the PO.


Click the save button  when complete

Click **Submit for Approval** 5





The screenshot displays the 'Accounting Items' interface. At the top, there is a table titled 'Accounting Detail for Commodity Item 1' with columns: Line, Index, Fund, Orgn, Acct, Prog, Actv, Locn, Amount. The first row shows: 1, , 104200, 750110, 702010, 999999, , , 4,000.00. Below the table, there is a 'Requisition Notes' section with a pencil icon and a 'Submit for Approval' button. A red box labeled '4' highlights the 'Add/Edit Requisition Notes' button, and another red box labeled '5' highlights the 'Submit for Approval' button. A legend at the bottom identifies icons for History, PDF, Cancel, and Copy.

Line	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Amount
1		104200	750110	702010	999999			4,000.00

 **History:** Allows you to see where the Web Req has been

 **PDF:** Enables you to print out the web Req for your files

 **Cancel:** Allows you to cancel the Web Req


 **Copy:** Allows you to copy the Web Req

Note:

- You can cancel any requisition that you create, but you have to cancel it **before** you send it to Purchasing.
- Once the requisition has been submitted for approval, only a member of the Purchasing Dep. can cancel it.

Send for Budgetary Approval

Depending upon the commodity item you will need to send the Web Req for budgetary authorization (PSA's do not need to go for budgetary authorization)

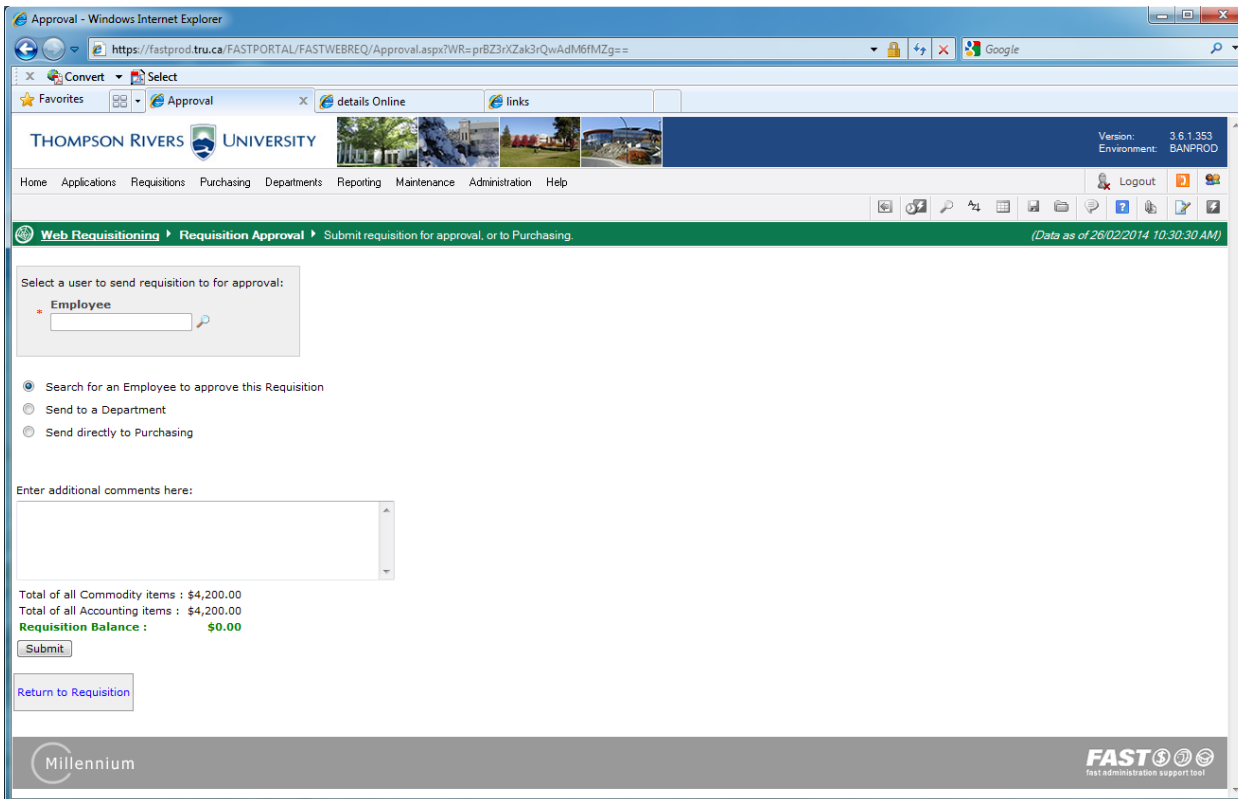
Click  and enter the persons last name and click search

Double click on the correct name OR

Click **Send Directly to Purchasing** if no budgetary authorization is needed

Click in the **Enter Additional Comments Here**, if you would like to send a message to the recipient

Click **Submit**



Approval - Windows Internet Explorer
https://fastprod.tru.ca/FASTPORTAL/FASTWEBREQ/Approval.aspx?WR=prBZ3rXZak3rQwAdM6fMZg==

THOMPSON RIVERS UNIVERSITY
Version: 3.6.1.353
Environment: BIANPROD

Home Applications Requisitions Purchasing Departments Reporting Maintenance Administration Help

Web Requisitioning > Requisition Approval > Submit requisition for approval, or to Purchasing (Data as of 28/02/2014 10:30:30 AM)

Select a user to send requisition to for approval:

Employee

Search for an Employee to approve this Requisition
 Send to a Department
 Send directly to Purchasing

Enter additional comments here:

Total of all Commodity items : \$4,200.00
Total of all Accounting items : \$4,200.00
Requisition Balance : \$0.00

Millennium FAST fast administration support tool

Viewing the Status of a Requisition

NOTE: When you are searching a requisition everything must be in upper case. Use only one filter option for best results.

Click **Requisitions** and **Requisition Status**, you can only view a requisition that you created

Specific Requisitions: If you know the Web Req # you are looking for

Created By: Enter your first initial and last name, no spaces (Best Option)

Suggested Vendor: Enter first part of vendor name, ex: Columbia Transport enter COLUMBIA

And press **Execute Report** 6

The screenshot displays the 'Requisition Status' search page in the FAST Single Sign On Suite. The page is titled 'Web Requisitioning > Requisition Status > Search for status of requisitions'. It features a 'Report Options' section with 'Filter Options' selected. The filters include:

- Specific Requisition: Equal
- Created By: Equal
- Approval Queue: Equal
- Suggested Vendor: Equal
- Posted: [Dropdown]
- PO: [Dropdown]
- Cancelled: [Dropdown]
- Required Date: Equal
- Activity Date: Equal
- CHART: 1
- FUND: [Text Input]
- ORGN: [Text Input]
- ACCT: [Text Input]

At the bottom right, there is a green 'Execute Report' button and a red 'Clear Filter Options' button. A red box with the number '6' is placed over the 'Execute Report' button.

Viewing the Status of a Requisition cont'd

Req ID: Click on the WR# to view the Web Req

Notes: Click on the icon to view any notes for the Web Req, red * indicates notes attached

Attach: Click to view all attachments

Required Date: This is the date that was entered when the Web Req was created

Activity Date: This is the date the Web Req was sent to Purchasing

Created By: Person who created Web Req

Suggested Vendor: Vendor Name

Posted: Verifies Web Req was posted to Banner

PO: Click on the green arrow to view the PO

Cancelled: Shows cancellation reasons if the Web Req was cancelled

Cancelled By: Shows who cancelled the Web Req

Approval Queue: Shows where the Web Req is

Copy: click on the page icon to copy the Web Req

Commodity Total: Total value of the PO

The screenshot displays the 'Requisition Status' page in the Thompson Rivers University system. The page header includes the university logo and navigation tabs for Home, Applications, Requisitions, Purchasing, Departments, Reporting, Maintenance, Administration, and Help. The main content area shows a table of requisitions with the following columns: Row #, Req ID, Notes, Attach, Required Date, Activity Date, Created By, Suggested Vendor, Posted, PO, Cancelled, Cancelled By, Approval Queue, Copy, and Commodity Total. The table lists 13 requisitions, with a total commodity value of \$18,376,235.62. The interface also includes a 'Report Options' section with 'Grid' and 'Graph' views, and a footer with 'Grid Height' and 'Records per Page' settings.

Row #	Req ID	Notes	Attach	Required Date	Activity Date	Created By	Suggested Vendor	Posted	PO	Cancelled	Cancelled By	Approval Queue	Copy	Commodity Total
1	WR017947			01/11/2013	30/10/2013	DTURNBULL	Columbia Transport Training Ltd	✓	✓			PURCHASING		\$2,574.00
2	WR017929			28/10/2013	25/10/2013	DTURNBULL	Columbia Shuswap Regional District			Wrong Vendor	HHAMILTON	HHAMILTON		\$3,773.25
3	WR017548			23/09/2013	20/09/2013	DTURNBULL	Columbia Transport Training Ltd	✓	✓			PURCHASING		\$2,574.00
4	WR017080			25/07/2013	23/07/2013	HHAMILTON	Columbia Transport Training Ltd							\$0.00
5	WR017079			31/07/2013	25/07/2013	HHAMILTON	Columbia Transport Training Ltd	✓	✓			PURCHASING		\$2,340.00
6	WR016733			24/06/2013	17/06/2013	SCROSS	Columbia Transport Training Ltd	✓	✓			PURCHASING		\$5,359,640.95
7	WR016330			24/05/2013	09/05/2013	DTURNBULL	Columbia Transport Training Ltd	✓	✓			PURCHASING		\$2,691.00
8	WR015429			14/02/2013	12/02/2013	DTURNBULL	Columbia Transport Training Ltd	✓	✓			PURCHASING		\$2,576.00
9	WR015272			28/02/2013	26/02/2013	GWEREMCZUK	Columbia Valve & Fitting Ltd.			Paid by P-Card	ALAFRANCE	PURCHASING		\$45.70
10	WR014886			27/12/2012	21/12/2012	HHAMILTON	Columbia Transport Training Ltd	✓	✓			PURCHASING		\$5,600,000.00
11	WR014538			17/11/2012	14/11/2012	HHAMILTON	Columbia Transport Training Ltd	✓	✓			PURCHASING		\$168,000.00
12	WR014532			11/11/2012	01/11/2012	SCROSS	Columbia Transport Training Ltd	✓	✓			PURCHASING		\$5,600,000.00
13	WR014048			15/09/2012	11/09/2012	HHAMILTON	Columbia Transport Training Ltd	✓	✓			PURCHASING		\$32,256.00
														\$18,376,235.62